

A banner with a blue and white abstract background featuring glowing lines and dots. The text "CAPPS HR/PAYROLL" is on the top line and "End-User Training (EUT)" is on the bottom line, both in a bold, dark blue font.

CAPPS HR/PAYROLL End-User Training (EUT)

EUT Course - 190 Performance Management for Employees

PeopleSoft 9.2
November, 2017 (revised)

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Performance Management for Employees

Section 2 - Employee Performance Process Steps

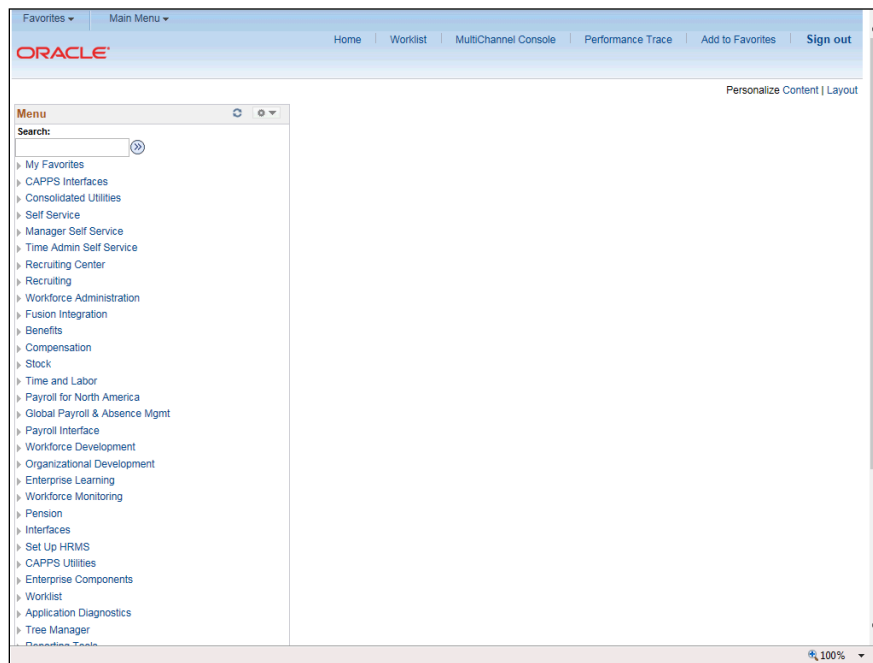
Reviewing Defined Criteria for Long Document

Section 2, Lesson 1 Exercise - Scenario: Reviewing Defined Criteria for Long Document

Procedure

In this lesson you will learn how to review defined criteria on a Statewide Long Document.

| Step | Action |
|------|--|
| 1. | <p>Note: The CAPPS HR/Payroll Dashboard (home page) that you see here is for training purposes only and may display more functionality (menus) than you will see in your environment.</p> <p>The view of your home page will vary according to your role.</p> |

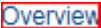




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| Step | Action |
|------|--|
| 2. | Click the Self Service link. ▶ Self Service |
| 3. | All of the Performance Management tasks will be conducted within the Performance Management Module. Click the Performance Management link. Performance Management |
| 4. | Within the Performance Management Module, there is a folder for Performance Documents . |
| 5. | The Other's Performance Documents folder is where you will find requests from managers nominating you to participate in providing feedback to another employee's performance evaluation. |
| 6. | This is also where you will complete the participant evaluation (Competency section) and review historical participant evaluations that you have completed. |
| 7. | Click the My Performance Documents link. My Performance Documents |
| 8. | Within the My Performance Documents folder, there are links for documents that need to be Created (not used for Employees) , have been created (Current), and are Complete (Historical). |
| 9. | Click the Current Documents link. Current Documents |
| 10. | This page lists the Current Performance Documents for you. There will normally be one document listed on the Current Performance Documents page that will indicate the Document Status and Period Dates . |
| 11. | Agencies will have various names for the Performance Documents. In training, we will use either the Statewide Long or Short Document Types . |
| 12. | Reviewing Defined Criteria is not a required step therefore some agencies may or may not require their employees to review. The next step in the process is Checkpoint 1 (if applicable) that is why you see it listed as the Document Status. |
| 13. | Click the Statewide Long Document Type link. Statewide Long Document Type |

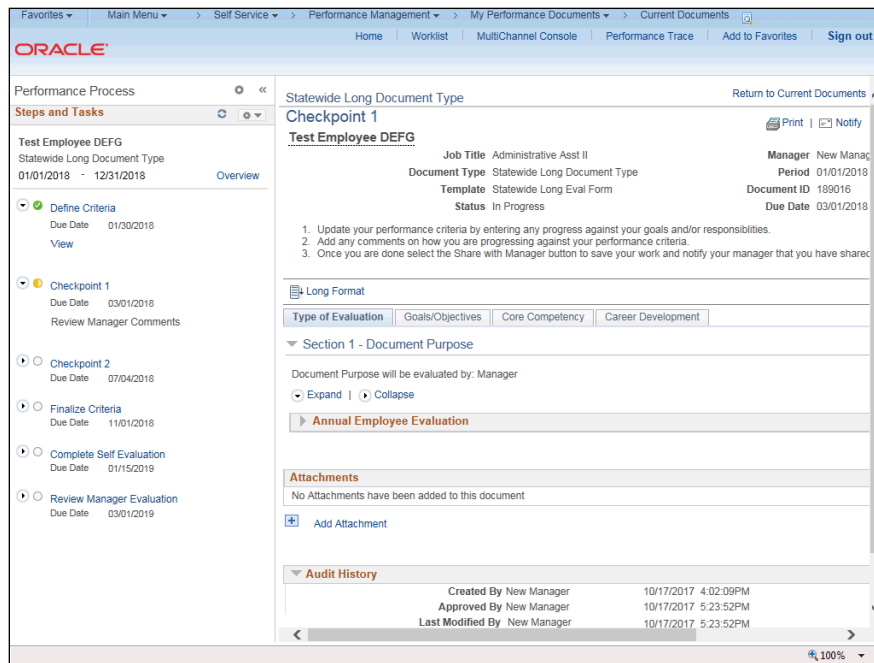
| Step | Action |
|------|--|
| 14. | <p>Let's review this page by sections.</p> <p>To the left is the Activity Guide which tells you where you are within the Performance Management Process.</p> <p>Depending upon your business process(es), you may or may not complete every single step/task.</p> |
| 15. | <p>You will notice that there is a green icon next to Define Criteria. This means that this step is Complete.</p> <p>The Define Criteria step was completed by the manager and now you can review what they completed.</p> |
| 16. | Yellow means this step is waiting to be completed as in the Checkpoint 1 listed. |
| 17. | There are due dates within the steps. They serve as a guide for the Manager to complete the steps in the process. |
| 18. | Managers have 30 days to complete Define Criteria . |
| 19. | <p>Checkpoint 1 due dates are 305 days before Period End Date.</p> <p>(Completing Checkpoints are optional).</p> |
| 20. | Checkpoint 2 is 180 days before Period End Date. |
| 21. | Finalize Criteria is 60 days before the Period End date. |
| 22. | Complete Self Evaluation and Review Manager Evaluation are the last steps for the Employee to complete. The due dates are 15 days after the Period End Date. |
| 23. | <p>Click the Overview link.</p> <p></p> |
| 24. | <p>The Overview page provides details on the Performance Process Steps.</p> <p>Keep in mind that it all depends on your agency's business processes if certain steps will be performed or not.</p> |
| 25. | <p>Click the More Details link.</p> <p></p> |
| 26. | <p>Click the Close link.</p> <p></p> |

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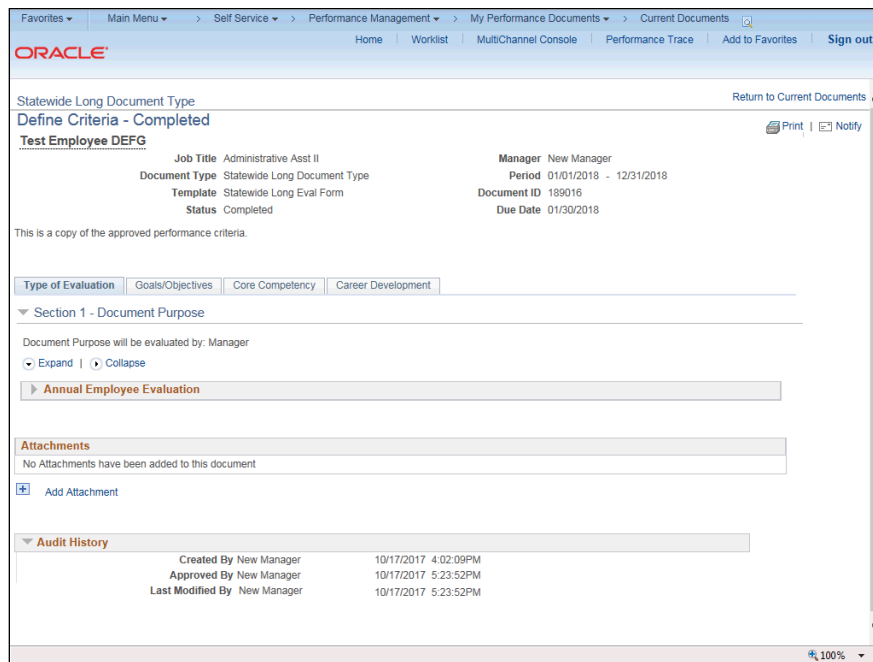
| Step | Action |
|------|---|
| 27. | <p>You may need to minimize the Activity Guide to review the Statewide Document on the right.</p> <p>Click the Minimize Performance Process button.</p>  |
| 28. | <p>To bring the Activity Guide back,</p> <p>Click the Expand button.</p>  |
| 29. | <p>To see details for the Defined Criteria step you must expand this step.</p> <p>Click the Expand Sub Steps button.</p>  |



The screenshot displays the Oracle CAPPS HR/PAYROLL system interface. The top navigation bar includes links for Favorites, Main Menu, Self Service, Performance Management, My Performance Documents, and Current Documents. The main content area is titled "Performance Process" and shows a "Statewide Long Document Type" for "Test Employee DEFG". The document is in "In Progress" status, with a due date of 03/01/2018. The document is managed by "New Manager" and has a document ID of 189016. The document type is "Statewide Long Document Type" and the template is "Statewide Long Eval Form".

The document is divided into sections for evaluation, including "Section 1 - Document Purpose" and "Annual Employee Evaluation". The "Annual Employee Evaluation" section is currently expanded. The document also includes an "Attachments" section and an "Audit History" section. The audit history shows that the document was created by "New Manager" on 10/17/2017 at 4:02:09PM, approved by "New Manager" on 10/17/2017 at 5:23:52PM, and last modified by "New Manager" on 10/17/2017 at 5:23:52PM.

| Step | Action |
|------|--|
| 30. | To view the Statewide Long Document Type with the defined criteria more easily you will use the View option. Click the View link. View |
| 31. | The top portion of the page states the Define Criteria - Completed because you are viewing the defined criteria that was completed by the manager. This section also includes details regarding this evaluation. |
| 32. | The print icon allows you to view and print the document in a pdf format. |
| 33. | The bottom half of the page contains Evaluation Tabs with defined criteria for your review. |
| 34. | The current tab is on Type of Evaluation . This tells you the Document Purpose. This particular document is for an Annual Employee Evaluation . |




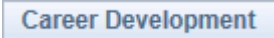



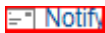


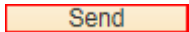

| Step | Action |
|------|--|
| 35. | Click the Goals/Objectives tab. Goals/Objectives |

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| Step | Action |
|------|---|
| 36. | <p>The Goals/Objectives are collapsed so you will expand them in order to view all of the details at once.</p> <p>Click the Expand link.</p> <p></p> |
| 37. | You will review every Goal , the descriptions, and any other information that has been entered. |
| 38. | Click the scrollbar. |
| 39. | Review Goals and Descriptions for Goals 2, 3 and 4. |
| 40. | Click the scrollbar. |
| 41. | <p>Click the Core Competency tab.</p> <p></p> |
| 42. | <p>Click the Expand link.</p> <p></p> |
| 43. | Review all of the Competencies and the descriptions . |
| 44. | Click the scrollbar. |
| 45. | Continue reviewing the Competencies and descriptions . |
| 46. | Click the scrollbar. |
| 47. | <p>Click the Career Development tab.</p> <p></p> |
| 48. | <p>Click the Expand link.</p> <p></p> |
| 49. | Review the Employee Career Development Area and any descriptions and comments. |
| 50. | Click the scrollbar. |
| 51. | Click the scrollbar. |
| 52. | <p>Note: Goals/Objectives and Career Development can be added/deleted/edited throughout the entire Performance Management process.</p> <p>Based on discussions and performance, the manager may make changes in these areas.</p> |
| 53. | Competencies can be added/deleted/edited up until the manager completes the Finalize Criteria step. After that, no additional changes can be made to competencies. |

| Step | Action |
|------|---|
| 54. | <p>Reviewing defined criteria is not a requirement for an employee unless the manager requests, therefore there is no action for you to perform in the system.</p> <p>However, there is a notify button that you can use to send an email to your manager informing them that you have reviewed per their request.</p> <p>Click the Notify link.</p>  |
| 55. | <p>Enter the desired information into the To field. Enter "manageremail@texas.gov".</p> <p>To </p> |
| 56. | <p>Enter the desired information into the Message Text field. Enter "I have reviewed the defined criteria per your request.".</p> <p>Message Text </p> |
| 57. | <p>Click the Send button.</p>  |
| 58. | <p>Click the Home link.</p>  |
| 59. | <p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p> |

Reviewing Checkpoint Feedback

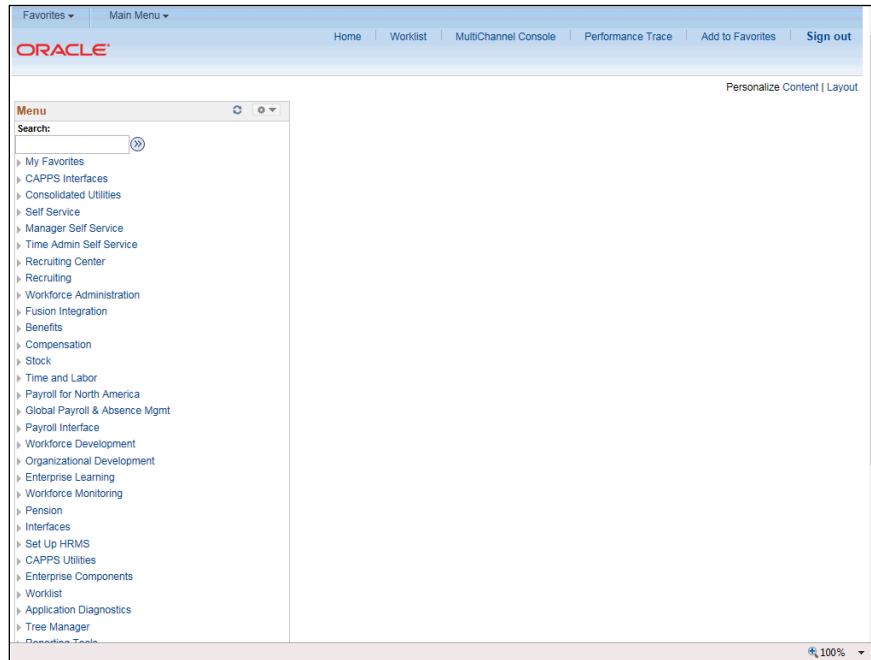
Section 2, Lesson 2 Exercise - Scenario: Reviewing Checkpoint Feedback

Procedure

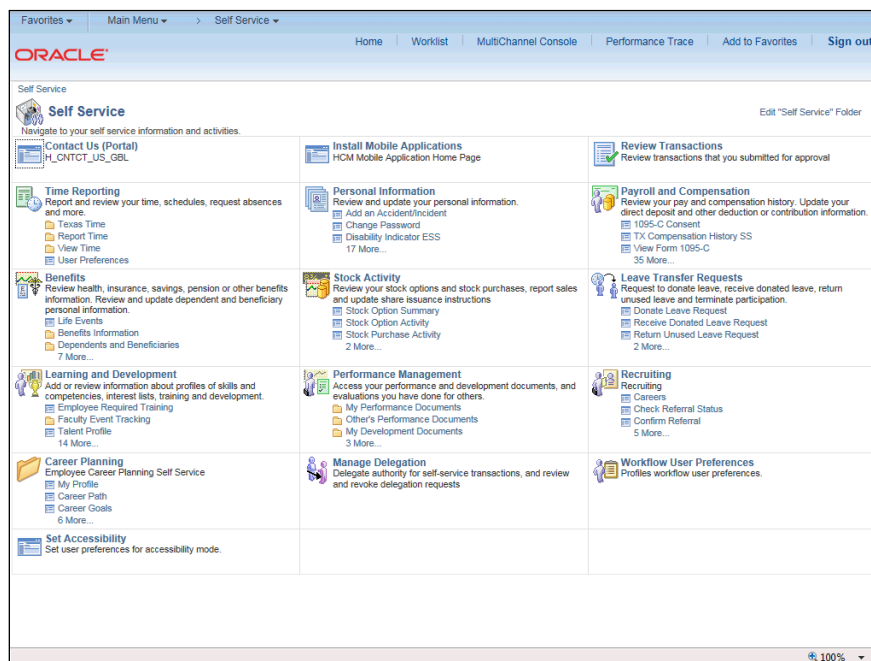
In this lesson you will learn how to review Checkpoint feedback, if applicable.



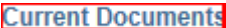
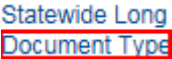

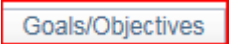

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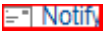


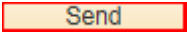

EUT Course



| Step | Action |
|------|---|
| 1. | Click the Self Service link. Self Service |



| Step | Action |
|------|---|
| 2. | Click the Performance Management link.  |
| 3. | Click the Current Documents link.  |
| 4. | Click the Current Documents link.  |
| 5. | Click the Statewide Long Document Type link.  |
| 6. | You are about to review the Checkpoint 1 feedback provided by your manager. Checkpoints are status updates within the evaluation period where a manager has identified where an employee stands with the assigned Goals/Objectives, Competencies and Employee Development for their position. |
| 7. | Click the Minimize Performance Process button.  |
| 8. | Click the Goals/Objectives tab.  |
| 9. | Click the Expand link.  |
| 10. | You will review the Status and Manager Comments for each Goal assigned. |
| 11. | Click the Scroll bar . |
| 12. | The manager may have added their comments in the Goals & Objectives Summary text box. |
| 13. | Click the Scroll bar . |
| 14. | Click the Scroll bar . |
| 15. | Click the Core Competency tab.  |
| 16. | For Competencies , there are no status updates within a Check Point. Although managers may include comments for the Competency summary. The manager can also add and delete competencies throughout the year prior to them finalizing criteria. |

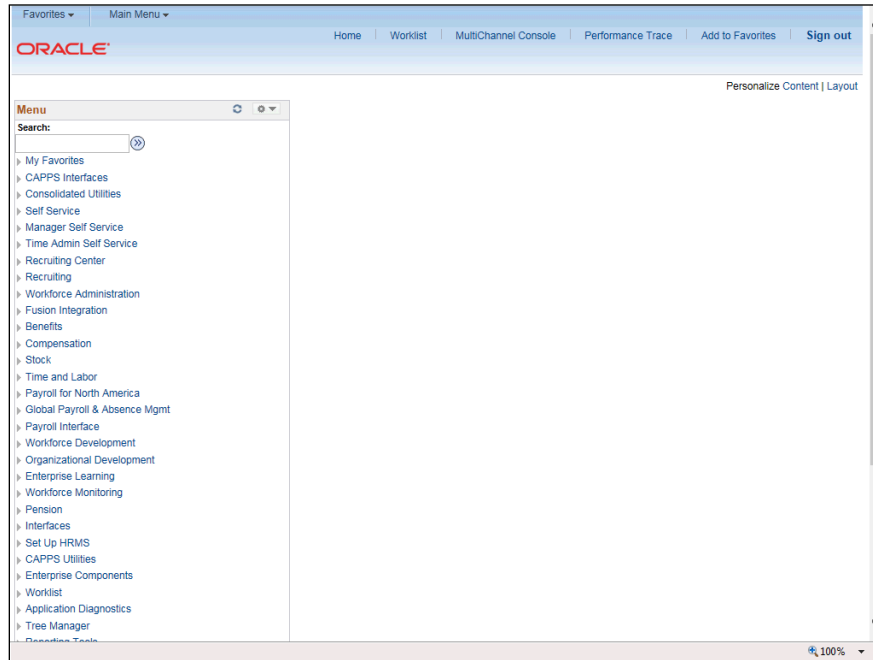
| Step | Action |
|------|--|
| 17. | Click the Career Development tab.  |
| 18. | Click the Expand link.  |
| 19. | The manager has indicated PMP certification as an area planned for development. Review the Manager Comments for this area. |
| 20. | Click the Scroll bar . |
| 21. | The manager did not make any updates to the Development section and there are no comments. |
| 22. | Click the Scroll bar . |
| 23. | You have reviewed the Checkpoint 1 feedback and will notify the manager. Click the Notify link.  |
| 24. | Enter the desired information into the To field. Enter " manageremail@texas.gov ". To  |
| 25. | Enter the desired information into the Message Text field. Enter " I have reviewed the Checkpoint Feedback. ". Message Text  |
| 26. | Click the Send button.  |
| 27. | Click the Home link.  |
| 28. | Congratulations! You have completed this lesson. End of Procedure. |

Completing Self-Evaluation

Section 2, Lesson 3 Exercise - Scenario: Completing Self-Evaluation

Procedure

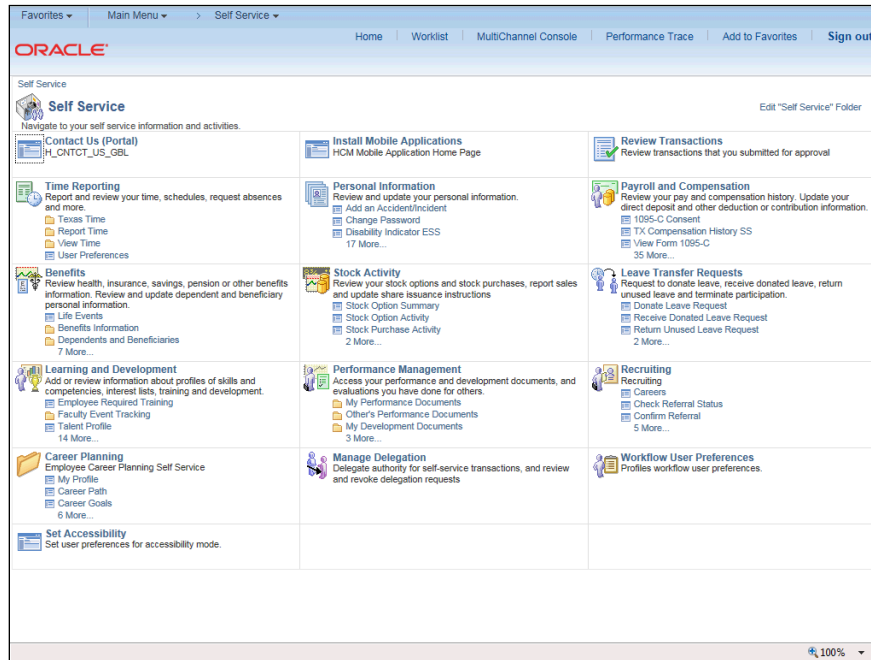
In this lesson, you will learn how to complete an employee self evaluation upon request by your manager.


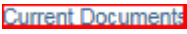
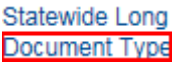




| Step | Action |
|------|---|
| 1. | Click the Self Service link. Self Service |

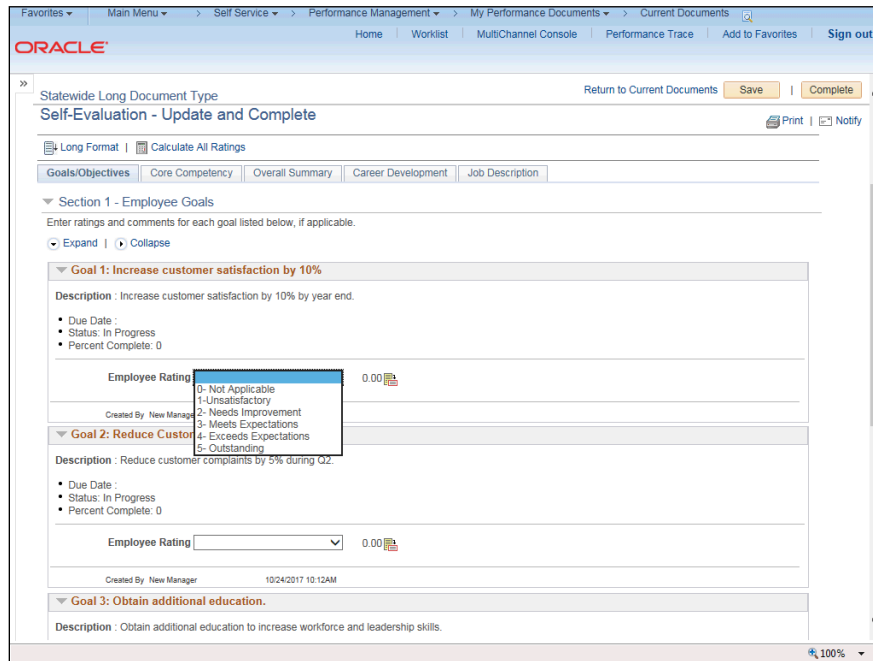
CAPPS HR/PAYROLL

EUT Course



| Step | Action |
|------|--|
| 2. | Click the Performance Management link.  |
| 3. | Click the Current Documents link.  |
| 4. | This page lists the current document where you will need to complete your self-evaluation with a status of Evaluation in Progress. |
| 5. | Click the Statewide Long Document Type link.  |
| 6. | You are on the Update and Complete Self Evaluation step. |
| 7. | Click the Minimize Performance Process button.  |
| 8. | You will go through each of the Evaluation Tabs and enter information accordingly. There will be ratings to select and comment boxes for Goals and Competencies . |
| 9. | Click the Expand link.  |
| 10. | Click the Scroll bar . |

| Step | Action |
|------|---|
| 11. | Click the Employee Rating list. Employee Rating <input type="text" value="▼"/> |



Statewide Long Document Type
Self-Evaluation - Update and Complete

Long Format | Calculate All Ratings

Goals/Objectives | Core Competency | Overall Summary | Career Development | Job Description

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand | Collapse

Goal 1: Increase customer satisfaction by 10%

Description : Increase customer satisfaction by 10% by year end.

- Due Date :
- Status: In Progress
- Percent Complete: 0

Employee Rating

Created By: New Manager

Goal 2: Reduce customer complaints by 5% during Q2.

Description : Reduce customer complaints by 5% during Q2.

- Due Date :
- Status: In Progress
- Percent Complete: 0

Employee Rating

Created By: New Manager 10/24/2017 10:12AM

Goal 3: Obtain additional education.

Description : Obtain additional education to increase workforce and leadership skills.

| Step | Action |
|------|---|
| 12. | Click the 4- Exceeds Expectations list item. 4- Exceeds Expectations |

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Oracle Self-Evaluation - Update and Complete

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand Collapse

Goal 1: Increase customer satisfaction by 10%

Description: Increase customer satisfaction by 10% by year end.

- Due Date:
- Status: In Progress
- Percent Complete: 0

Employee Rating: 4 Exceeds Expectations 4.00

Created By: New Manager 10/24/2017 10:12AM

Goal 2: Reduce Customer Complaints by 5%

Description: Reduce customer complaints by 5% during Q2.

- Due Date:
- Status: In Progress
- Percent Complete: 0

Employee Rating: 0.00

Created By: New Manager 10/24/2017 10:12AM

Goal 3: Obtain additional education.

Description: Obtain additional education to increase workforce and leadership skills.

| Step | Action |
|------|--|
| 13. | Click the Employee Rating list. Employee Rating <input type="text" value="4 Exceeds Expectations"/> |

Oracle Self-Evaluation - Update and Complete

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand Collapse

Goal 1: Increase customer satisfaction by 10%

Description: Increase customer satisfaction by 10% by year end.

- Due Date:
- Status: In Progress
- Percent Complete: 0

Employee Rating: 4 Exceeds Expectations 4.00

Created By: New Manager 10/24/2017 10:12AM

Goal 2: Reduce Customer Complaints by 5%

Description: Reduce customer complaints by 5% during Q2.

- Due Date:
- Status: In Progress
- Percent Complete: 0

Employee Rating: 0.00

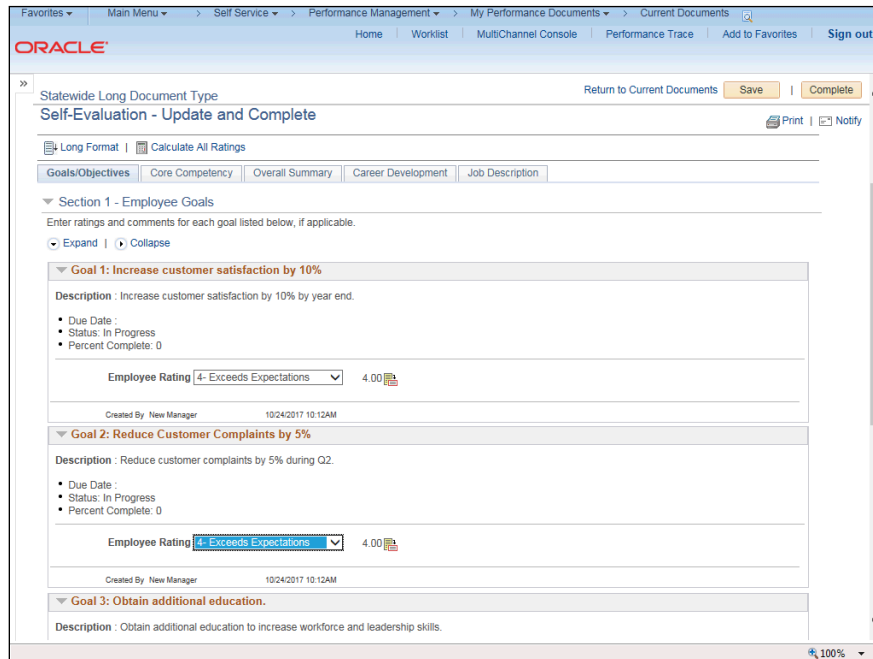
Created By: New Manager 10/24/2017 10:12AM

Goal 3: Obtain additional education.

Description: Obtain additional education to increase workforce and leadership skills.

0 - Not Applicable
1 - Unsatisfactory
2 - Needs Improvement
3 - Meets Expectations
4 - Exceeds Expectations
5 - Outstanding

| Step | Action |
|------|---|
| 14. | Click the 4- Exceeds Expectations list item. 4- Exceeds Expectations |



Statewide Long Document Type
Self-Evaluation - Update and Complete

Return to Current Documents Save Complete

Long Format Calculate All Ratings

Goals/Objectives Core Competency Overall Summary Career Development Job Description

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand Collapse

Goal 1: Increase customer satisfaction by 10%

Description : Increase customer satisfaction by 10% by year end.

- Due Date :
- Status: In Progress
- Percent Complete: 0

Employee Rating 4- Exceeds Expectations 4.00

Created By: New Manager 10/24/2017 10:12AM

Goal 2: Reduce Customer Complaints by 5%

Description : Reduce customer complaints by 5% during Q2.

- Due Date :
- Status: In Progress
- Percent Complete: 0

Employee Rating 4- Exceeds Expectations 4.00

Created By: New Manager 10/24/2017 10:12AM

Goal 3: Obtain additional education.

Description : Obtain additional education to increase workforce and leadership skills.

100%

| Step | Action |
|------|---|
| 15. | Click the Scroll bar . |
| 16. | Click the Employee Rating list. Employee Rating <input type="text" value="4- Exceeds Expectations"/> |

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Oracle Self-Evaluation - Update and Complete

Created By: New Manager 10/24/2017 10:12AM

Goal 3: Obtain additional education.

Description: Obtain additional education to increase workforce and leadership skills.

- Due Date:
- Status: In Progress
- Percent Complete: 0

Employee Rating: 0.00

Created By: New Manager

Goals Summary

Employee Comments

Audit History

Created By: New Manager 10/24/2017 10:12:33AM

Last Modified By: New Manager 10/24/2017 11:17:08AM

| Step | Action |
|------|---|
| 17. | Click the 3- Meets Expectations list item. 3- Meets Expectations |

Oracle Self-Evaluation - Update and Complete

Created By: New Manager 10/24/2017 10:12AM

Goal 3: Obtain additional education.

Description: Obtain additional education to increase workforce and leadership skills.

- Due Date:
- Status: In Progress
- Percent Complete: 0

Employee Rating: 3.00

Created By: New Manager 10/24/2017 10:12AM



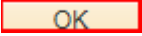

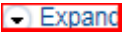

Goals Summary

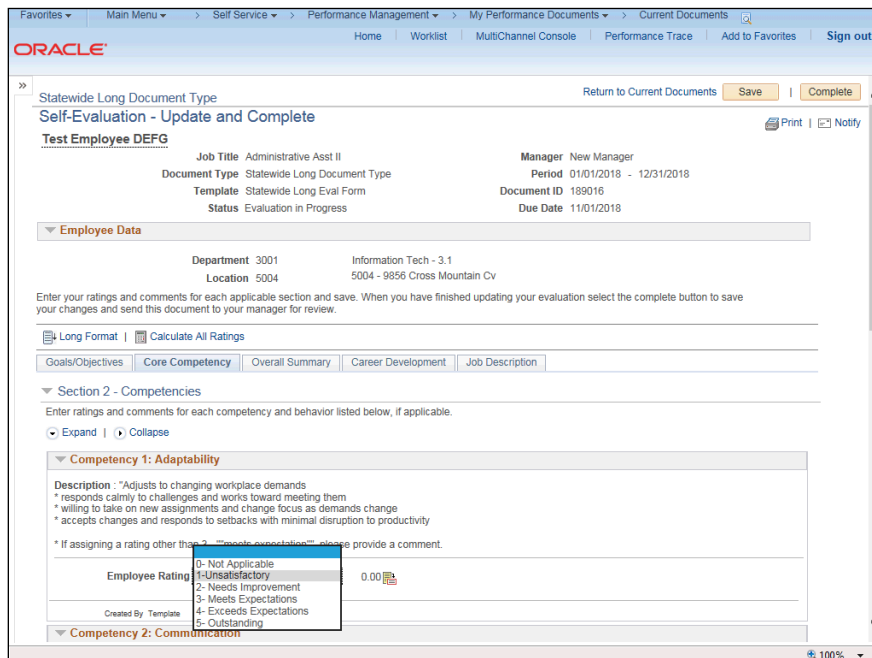
Employee Comments

Audit History

Created By: New Manager 10/24/2017 10:12:33AM

Last Modified By: New Manager 10/24/2017 11:17:08AM

| Step | Action |
|------|--|
| 18. | Enter the desired information into the field. Enter " I am making great progress toward meeting and exceeding the assigned goals/objectives. ".  |
| 19. | Click the Spell Check Comments (Alt+5) button.  |
| 20. | Click the OK button.  |
| 21. | Click the Scroll bar . |
| 22. | Click the Core Competency tab.  |
| 23. | Click the Expand link.  |
| 24. | Click the Employee Rating list. Employee Rating  |



The screenshot shows the Oracle CAPPS Self-Evaluation - Update and Complete form. The form is titled "Self-Evaluation - Update and Complete" and is for "Test Employee DEFG". It includes fields for Job Title (Administrative Asst II), Manager (New Manager), Document Type (Statewide Long Document Type), Template (Statewide Long Eval Form), Status (Evaluation in Progress), Period (01/01/2018 - 12/31/2018), Document ID (189016), and Due Date (11/01/2018). The form also displays Employee Data (Department 3001, Location 5004) and a section for Competencies. The "Core Competency" tab is selected, and the "Expand" link is visible. The "Competency 1: Adaptability" section is expanded, showing a description and a list of ratings (0-5). The "Employee Rating" dropdown is open, showing the following options: 0- Not Applicable, 1- Unsatisfactory, 2- Needs Improvement, 3- Meets Expectations, 4- Exceeds Expectations, and 5- Outstanding. The "Competency 2: Communication" section is also visible.

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| Step | Action |
|------|---|
| 25. | Click the 4- Exceeds Expectations list item. 4- Exceeds Expectations |

Statewide Long Document Type
Self-Evaluation - Update and Complete
Test Employee DEFG

Job Title Administrative Asst II
Document Type Statewide Long Document Type
Template Statewide Long Eval Form
Status Evaluation in Progress

Manager New Manager
Period 01/01/2018 - 12/31/2018
Document ID 189016
Due Date 11/01/2018

Employee Data

Department 3001 Information Tech - 3.1
Location 5004 5004 - 9856 Cross Mountain Cv

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

Long Format | Calculate All Ratings

Goals/Objectives | Core Competency | Overall Summary | Career Development | Job Description

Section 2 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Expand | Collapse

Competency 1: Adaptability

Description : *Adjusts to changing workplace demands
* responds calmly to challenges and works toward meeting them
* willing to take on new assignments and change focus as demands change
* accepts changes and responds to setbacks with minimal disruption to productivity
* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Employee Rating 4- Exceeds Expectations 4.00

Created By Template 10/24/2017 10:12AM

Competency 2: Communication

| Step | Action |
|------|---|
| 26. | Click the scrollbar. |
| 27. | Click the Employee Rating list. Employee Rating <input type="text" value="4- Exceeds Expectations"/> |

Statewide Long Document Type

Self-Evaluation - Update and Complete

Competency 2: Communication

Description : Effectively conveys information and encourages an exchange of ideas

- * presents oral and written information required for the job in a clear, concise manner
- * expresses alternative points of view in a constructive manner
- * considers diverse perspectives when presenting ideas
- * experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
- * informs manager of obstacles and progress as appropriate

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Employee Rating: 0.00

Created By: New Manager

Competency 3: Leadership

Description : Creates an environment that fosters excellent performance

- * considers diverse perspectives and innovative ideas from employees
- * encourages employees to be focused and productive
- * uses available tools to track, report and analyze key performance indicators/measures to identify improvement opportunities
- * makes appropriate efforts to address workplace issues that threaten work-group productivity
- * exhibits trustworthiness, fairness, honesty and integrity
- * demonstrates a steady work ethic, a positive attitude and emotional maturity

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Employee Rating: 0.00

Created By: New Manager

10/24/2017 10:12AM

Competencies Summary

Employee Comments

| Step | Action |
|------|---|
| 28. | Click the 4- Exceeds Expectations list item. 4- Exceeds Expectations |

Statewide Long Document Type

Self-Evaluation - Update and Complete

Competency 2: Communication

Description : Effectively conveys information and encourages an exchange of ideas

- * presents oral and written information required for the job in a clear, concise manner
- * expresses alternative points of view in a constructive manner
- * considers diverse perspectives when presenting ideas
- * experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
- * informs manager of obstacles and progress as appropriate

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Employee Rating: 4- Exceeds Expectations 4.00

Created By: New Manager

10/24/2017 10:12AM

Competency 3: Leadership - Employee

Description : Creates an environment that fosters excellent performance

- * considers diverse perspectives and innovative ideas from employees
- * encourages employees to be focused and productive
- * uses available tools to track, report and analyze key performance indicators/measures to identify improvement opportunities
- * makes appropriate efforts to address workplace issues that threaten work-group productivity
- * exhibits trustworthiness, fairness, honesty and integrity
- * demonstrates a steady work ethic, a positive attitude and emotional maturity

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Employee Rating: 0.00

Created By: New Manager

10/24/2017 10:12AM

Competencies Summary

Employee Comments

CAPPS HR/PAYROLL

EUT Course



| Step | Action |
|------|--|
| 29. | Click the Employee Rating list. Employee Rating ▼ |

Statewide Long Document Type

Self-Evaluation - Update and Complete

Competency 2: Communication

Description : Effectively conveys information and encourages an exchange of ideas

- * presents oral and written information required for the job in a clear, concise manner
- * expresses alternative points of view in a constructive manner
- * considers diverse perspectives when presenting ideas
- * experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
- * informs manager of obstacles and progress as appropriate

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Employee Rating **4- Exceeds Expectations** 4.00

Created By: New Manager 10/24/2017 10:12AM

Competency 3: Leadership - Employee

Description : Creates an environment that fosters excellent performance

- * considers diverse perspectives and innovative ideas from employees
- * encourages employees to be focused and productive
- * uses available tools to track, report and analyze key performance indicators/measures to identify improvement opportunities
- * makes appropriate efforts to address workplace issues that threaten work-group productivity
- * exhibits trustworthiness, fairness, honesty and integrity
- * demonstrates a steady work ethic, a positive attitude and emotional maturity

* If assigning a rating other than 3 - "meets expectation", please provide a comment.


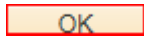
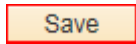
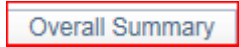

Employee Rating **0- Not Applicable** 0.00

Created By: New Manager

Competencies Summary

Employee Comments



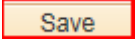








| Step | Action |
|------|---|
| 30. | Click the 4- Exceeds Expectations list item. 4- Exceeds Expectations |

| Step | Action |
|------|---|
| 31. | Click the scrollbar. |
| 32. | Enter the desired information into the field. Enter " I am exceeding all of the Competencies that relate to my position. ". |
| 33. | Click the Spell Check Comments (Alt+5) button.  |
| 34. | Click the OK button.  |
| 35. | Click the scrollbar. |
| 36. | Click the scrollbar. |
| 37. | Click the Save button.  |
| 38. | Click the Overall Summary tab.  |
| 39. | No entries to make on the Overall Summary tab. Click the Career Development tab.  |

CAPPS HR/PAYROLL

EUT Course



| Step | Action |
|------|--|
| 40. | Click the Expand link.  |
| 41. | Click the scrollbar. |
| 42. | Enter the desired information into the field. Enter " I have submitted the dates that the PMP certification courses are offered and am awaiting an approval. ".  |
| 43. | Click the Save button.  |
| 44. | Click the Job Description tab.  |
| 45. | Click the Expand link.  |
| 46. | Click the Yes option.  |
| 47. | Click the scrollbar. |
| 48. | Click the No option.  |
| 49. | Click the Save button.  |
| 50. | You will select the Complete button once you are all done and want the manager to be notified. Click the Complete button.  |
| 51. | Click the Confirm button.  |
| 52. | Click the Home link.  |
| 53. | Congratulations! You have completed this lesson. End of Procedure. |

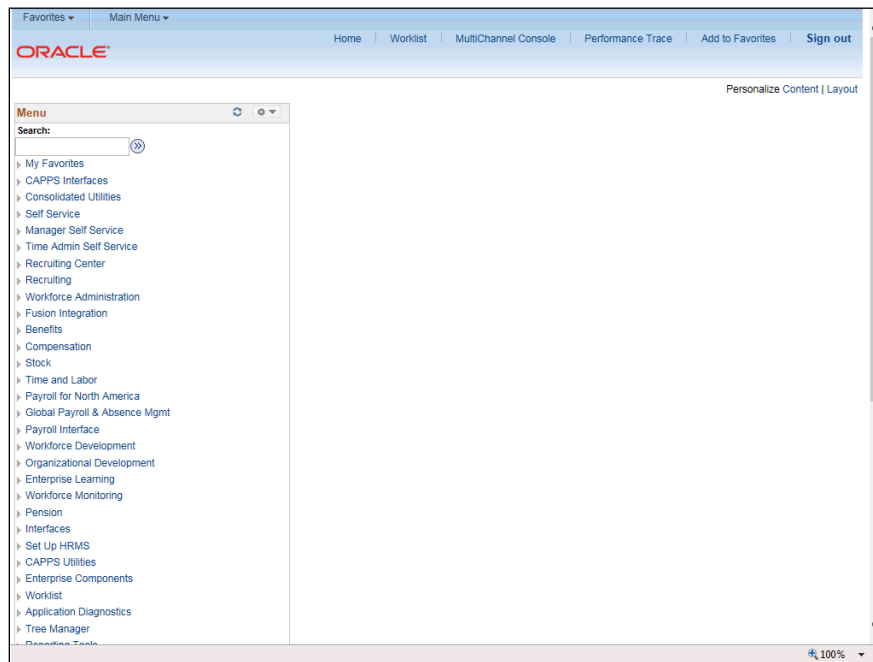
Accepting/Completing Participant Evaluation

Section 2, Lesson 4 Exercise - Scenario 1: Accepting/Completing Participant Evaluation

Procedure

In this lesson you will learn how to accept a nominee request and complete a Participant evaluation for the designated employee.

| Step | Action |
|------|---|
| 1. | <p>When you are nominated to participate in the evaluation of an employee, you will receive an auto-generated email request similar to this one.</p> <p>Within the email, you can select the URL and it will take you to the log in screen otherwise you can navigate there.</p> |



| Step | Action |
|------|---|
| 2. | <p>Click the Self Service link.</p> <p>Self Service</p> |
| 3. | <p>Click the Performance Management link.</p> <p>Performance Management</p> |

| Step | Action |
|------|--|
| 4. | <p>Other's Performance Document folder is where you will always go to respond to a nominee request to participate, complete the other employee's evaluation, and to review historical evaluations that you have completed for others.</p> <p>Click the Other's Performance Documents link.</p> <p>Other's Performance Documents</p> |
| 5. | <p>Click the Pending Evaluation Requests link.</p> <p>Pending Evaluation Requests</p> |
| 6. | <p>If you were nominated for multiple employees those requests would be listed here.</p> <p>The manager has the ability to delete their request whereby it will be removed from the list.</p> |
| 7. | <p>Click the Test Employee DEFG option.</p> <p>Test Employee DEFG</p> |
| 8. | <p>When you Accept or Deny the participant request, your response will automatically be sent via email to the manager.</p> |
| 9. | <p>Click the Accept button.</p> <p>Accept</p> |
| 10. | <p>After your acceptance, the manager receives an email indicating that you have accepted the request to participate as a Nominee.</p> <p>You can either come back to complete the employee evaluation or complete the evaluation now.</p> |
| 11. | <p>In training, you will go ahead and complete the evaluation.</p> <p>Click the Test Employee DEFG link.</p> <p>Test Employee DEFG</p> |
| 12. | <p>Notice that the Role says Peer at the top of this document.</p> |
| 13. | <p>As a Participant (nominee), you are completing the Competencies section of the evaluation for the designated employee.</p> <p>The employee will not see your participant evaluation only the manager can see it.</p> |
| 14. | <p>Click the Expand link.</p> <p>Expand</p> |
| 15. | <p>Review each Competency and the description and then enter a Rating.</p> |
| 16. | <p>Click the Rating list.</p> <p>Rating <input type="text" value=""/></p> |

Oracle CAPPS HR/PAYROLL EUT Course

Statewide Long Document Type

Test Employee DEFG

Job Title Administrative Asst II
Document Type Statewide Long Document Type
Template Statewide Long Eval Form
Status Evaluation in Progress
Reviewer Test Employee GG

Manager New Manager
Period 01/01/2018 - 12/31/2018
Document ID 189016
Due Date 01/15/2019
Role Peer

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Calculate All Ratings

Section 1 - Competencies

Expand | Collapse

Competency 1: Adaptability

Description : Adjusts to changing workplace demands
* responds calmly to challenges and works toward meeting them
* willing to take on new assignments and change focus as demands change
* accepts changes and responds to setbacks with minimal disruption to productivity
* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating

0- Not Applicable
1- Unsatisfactory
2- Needs Improvement
3- Meets Expectations
4- Exceeds Expectations
5- Outstanding

Competency 2: Communication

Description : Effectively conveys information and encourages an exchange of ideas
* presents oral and written information required for the job in a clear, concise manner
* expresses alternative points of view in a constructive manner
* considers diverse perspectives when presenting ideas
* experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
* informs manager of obstacles and progress as appropriate
* If assigning a rating other than 3 - "meets expectation", please provide a comment.

| Step | Action |
|------|---|
| 17. | Click the 4- Exceeds Expectations list item. 4- Exceeds Expectations |

CAPPS HR/PAYROLL

EUT Course



Oracle CAPPS HR/PAYROLL Interface - Evaluation Form

Navigation: Favorites | Main Menu | Self Service | Performance Management | Other's Performance Documents | Pending Evaluation Requests

Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out

Statewide Long Document Type Return to Current Documents Save Complete

Evaluation Print Notify

Test Employee DEFG

Job Title: Administrative Asst II Manager: New Manager
 Document Type: Statewide Long Document Type Period: 01/01/2018 - 12/31/2018
 Template: Statewide Long Eval Form Document ID: 199016
 Status: Evaluation in Progress Due Date: 01/15/2019
 Reviewer: Test Employee GG Role: Peer

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Calculate All Ratings

Section 1 - Competencies

Expand | Collapse

Competency 1: Adaptability

Description: "Adjusts to changing workplace demands
 * responds calmly to challenges and works toward meeting them
 * willing to take on new assignments and change focus as demands change
 * accepts changes and responds to setbacks with minimal disruption to productivity
 * If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: **4-Exceeds Expectations**

Created By: Template 10/17/2017 4:02PM

Competency 2: Communication

Description: Effectively conveys information and encourages an exchange of ideas
 * presents oral and written information required for the job in a clear, concise manner
 * expresses alternative points of view in a constructive manner
 * considers diverse perspectives when presenting ideas
 * experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
 * informs manager of obstacles and progress as appropriate

1. If assigning a rating other than 3 - "meets expectation", please provide a comment.

100%

| Step | Action |
|------|---|
| 18. | Click the Scroll bar . |
| 19. | Click the Rating list. Rating <input type="text" value="4-Exceeds Expectations"/> |

Oracle HR/Payroll System - Performance Management - Other's Performance Documents - Pending Evaluation Requests

Statewide Long Document Type

Return to Current Documents | Save | Complete

Evaluation

* accepts changes and responds to setbacks with minimal disruption to productivity
* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: 4- Exceeds Expectations

Created By: Template | 10/17/2017 4:02PM

Competency 2: Communication

Description: Effectively conveys information and encourages an exchange of ideas
* presents oral and written information required for the job in a clear, concise manner
* expresses alternative points of view in a constructive manner
* considers diverse perspectives when presenting ideas
* experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
* informs manager of obstacles and progress as appropriate

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: 3- Meets Expectations

Created By: New Manager | 10/17/2017 4:02PM

Competency 3: Leadership - Employee

Description: Creates an environment that fosters excellent performance
* considers diverse perspectives and innovative ideas from employees
* encourages employees to be focused and productive
* uses available tools to track, report and analyze key performance indicators/measures to identify improvement opportunities
* makes appropriate efforts to address workplace issues that threaten work-group productivity
* exhibits trustworthiness, fairness, honesty and integrity
* demonstrates a steady work ethic, a positive attitude and emotional maturity

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: 3- Meets Expectations

Created By: New Manager | 10/17/2017 4:04PM

| Step | Action |
|------|---|
| 20. | Click the 3- Meets Expectations list item. |

Oracle HR/Payroll System - Performance Management - Other's Performance Documents - Pending Evaluation Requests

Statewide Long Document Type

Return to Current Documents | Save | Complete

Evaluation

* accepts changes and responds to setbacks with minimal disruption to productivity
* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: 4- Exceeds Expectations

Created By: Template | 10/17/2017 4:02PM

Competency 2: Communication

Description: Effectively conveys information and encourages an exchange of ideas
* presents oral and written information required for the job in a clear, concise manner
* expresses alternative points of view in a constructive manner
* considers diverse perspectives when presenting ideas
* experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
* informs manager of obstacles and progress as appropriate

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: 3- Meets Expectations

Created By: New Manager | 10/17/2017 4:04PM

Competency 3: Leadership - Employee

Description: Creates an environment that fosters excellent performance
* considers diverse perspectives and innovative ideas from employees
* encourages employees to be focused and productive
* uses available tools to track, report and analyze key performance indicators/measures to identify improvement opportunities
* makes appropriate efforts to address workplace issues that threaten work-group productivity
* exhibits trustworthiness, fairness, honesty and integrity
* demonstrates a steady work ethic, a positive attitude and emotional maturity

* If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: 3- Meets Expectations

Created By: New Manager | 10/17/2017 4:04PM

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| Step | Action |
|------|--|
| 21. | Click the Scroll bar . |
| 22. | Click the Rating list. Rating <input type="text" value="3- Meets Expectations"/> |

Oracle HR/PAYROLL System - Evaluation Form

Statewide Long Document Type

Return to Current Documents | Save | Complete

Evaluation

- * experiences minimal difficulty working with others even when differences in communication style, viewpoints or culture exist
- * informs manager of obstacles and progress as appropriate
- * If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: **3- Meets Expectations**

Created By: New Manager | 10/17/2017 4:54PM

Competency 3: Leadership - Employee

Description: Creates an environment that fosters excellent performance

- * considers diverse perspectives and innovative ideas from employees
- * encourages employees to be focused and productive
- * uses available tools to track, report and analyze key performance indicators/measures to identify improvement opportunities
- * makes appropriate efforts to address workplace issues that threaten work-group productivity
- * exhibits trustworthiness, fairness, honesty and integrity
- * demonstrates a steady work ethic, a positive attitude and emotional maturity
- * If assigning a rating other than 3 - "meets expectation", please provide a comment.

Rating: **3- Meets Expectations**

Created By: New Manager

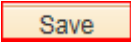

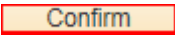
Competencies Summary


Comments

Font | Size | B | I | U | | A- |

| Step | Action |
|------|---|
| 23. | Click the 3- Meets Expectations list item. 3- Meets Expectations |

The screenshot shows the 'Evaluation' form in the CAPPS HR/PAYROLL system. The form is titled 'Statewide Long Document Type' and includes a 'Return to Current Documents' button. The 'Evaluation' section contains a 'Rating' dropdown menu set to '3- Meets Expectations' and a 'Comments' text area. Below this is the 'Competency 3: Leadership - Employee' section, which includes a description of the competency and a 'Rating' dropdown menu also set to '3- Meets Expectations'. The 'Competencies Summary' section at the bottom features a 'Comments' text area with a rich text editor toolbar. The interface includes navigation tabs at the top: 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign out'.

| Step | Action |
|------|--|
| 24. | Enter the desired information into the field. Enter " This employee is doing well enough to meet expectations. ". |
| 25. | Click the scrollbar. |
| 26. | You have an option to save what you have entered so far and come back to complete your evaluation. Click the Save button.  |
| 27. | You have completed everything and want to move your evaluation forward to the manager. Click the Complete button.  |
| 28. | Click the Confirm button.  |
| 29. | The manager receives an email indicating that you have completed the Participant Evaluation. They can review what you have entered. |

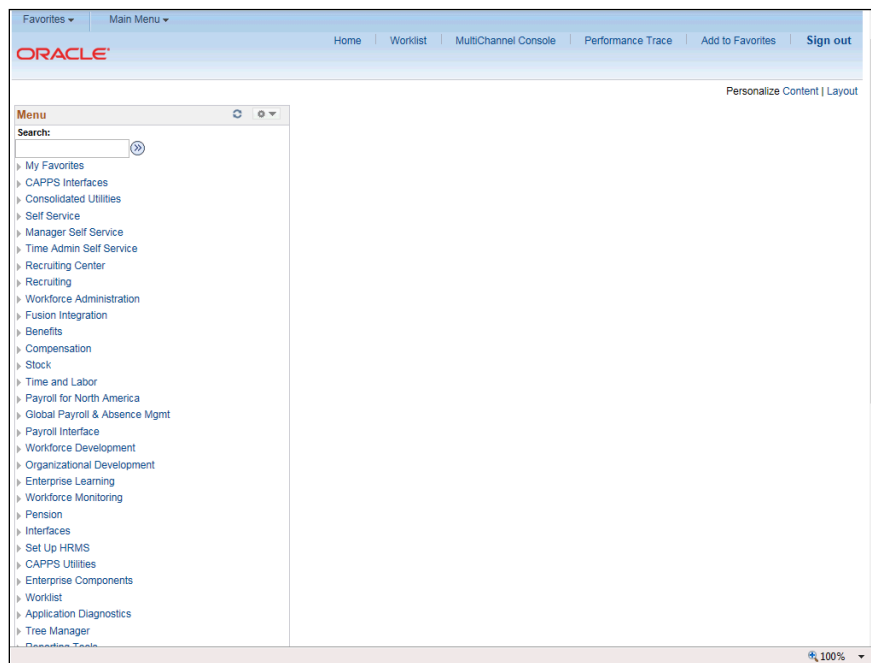
| Step | Action |
|------|--|
| 30. | Click the Home link.  |
| 31. | Congratulations! You have completed this lesson. End of Procedure. |


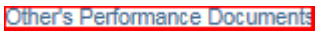

Declining the Participant Request

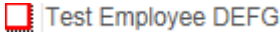
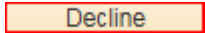
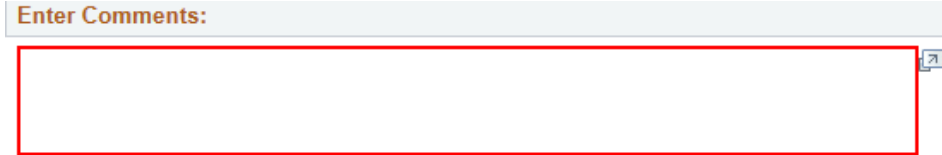
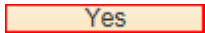

Section 2, Lesson 4 Exercise - Scenario 2: Declining the Participant Request

Procedure

In this lesson you will learn how to decline a request to participate as a nominee.



| Step | Action |
|------|---|
| 1. | Click the Self Service link.  |
| 2. | Click the Other's Performance Documents link.  |
| 3. | Click the Pending Evaluation Requests link.  |

| Step | Action |
|------|---|
| 4. | Click the Test Employee DEFG option.  |
| 5. | When you Accept or Decline the participant request, the system will send your response via email to the manager. |
| 6. | Click the Decline button.  |
| 7. | You can enter comments although they are not required. Enter the desired information into the Enter Comments field. Enter " I'm not familiar enough to be able to evaluate this employee. ".  |
| 8. | Notice the red text above, Are you sure you want to decline this evaluation request? Click the Yes button.  |
| 9. | Click the Home link.  |
| 10. | Congratulations! You have completed this lesson. End of Procedure. |

Reviewing Employee Final Evaluation

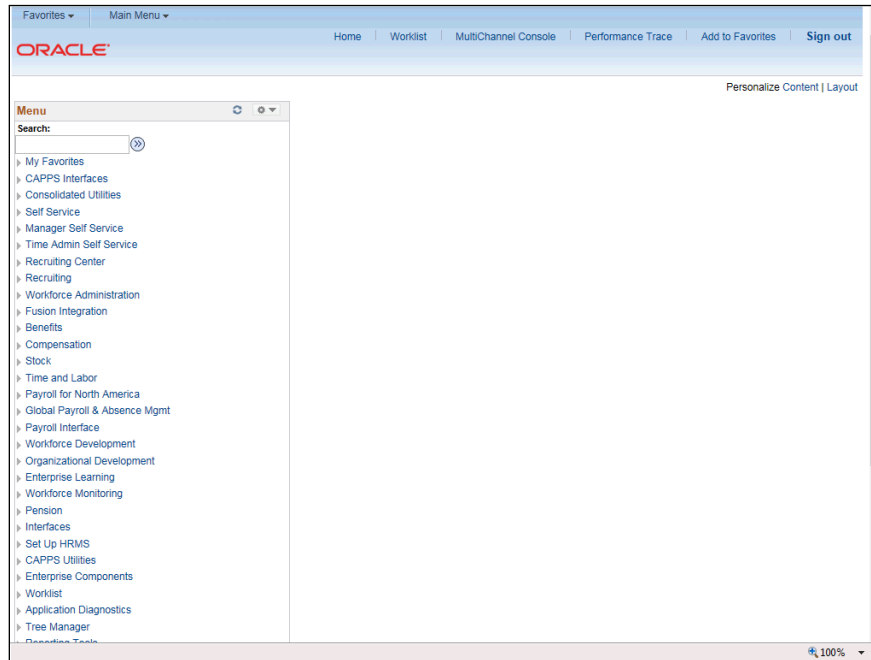
Section 2, Lesson 5 Exercise - Scenario: Reviewing Final Employee Evaluation



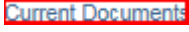
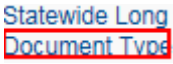

Procedure

In this lesson you will learn how to review the final employee evaluation and include comments.

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| Step | Action |
|------|--|
| 1. | Click the Self Service link.  |
| 2. | Click the Performance Management link.  |
| 3. | Click the Current Documents link.  |
| 4. | Click the Statewide Long Document Type link.  |
| 5. | Click the Minimize Performance Process button.  |
| 6. | You should review the Manager Ratings and any comments entered on all of the Evaluation Tabs . |

Oracle CAPPS HR/PAYROLL EUT Course

Statewide Long Document Type
Manager Evaluation - Review with Manager
Test Employee DEFG

Job Title Administrative Asst II
Document Type Statewide Long Document Type
Template Statewide Long Eval Form
Status Shared with Employee

Manager New Manager
Period 01/01/2018 - 12/31/2018
Document ID 189016
Due Date 03/01/2019

Employee Data

Department 2000 Operations Admin
Location 5000 5000 - 100 N Main St

This document is available for your review. You should review this document with your manager if you have not already done so.

Long Format

Type of Evaluation Goals/Objectives Core Competency Overall Summary Career Development Job Description Employee Comments

Section 2 - Employee Goals

Expand Collapse

Goal 1: Increase customer satisfaction by 10%
Goal 2: Reduce Customer Complaints by 5%
Goal 3: Obtain additional education.

Goals Summary

Manager Rating 4- Exceeds Expectations 3.67

Manager Comments Employee DEFG has proven to be a true asset to our department.

| Step | Action |
|------|--|
| 7. | Click the Expand link. Expand |

Oracle CAPPS HR/PAYROLL EUT Course

Statewide Long Document Type
Manager Evaluation - Review with Manager
Test Employee DEFG

Job Title Administrative Asst II
Document Type Statewide Long Document Type
Template Statewide Long Eval Form
Status Shared with Employee

Manager New Manager
Period 01/01/2018 - 12/31/2018
Document ID 189016
Due Date 03/01/2019

Employee Data

Department 2000 Operations Admin
Location 5000 5000 - 100 N Main St

This document is available for your review. You should review this document with your manager if you have not already done so.

Long Format

Type of Evaluation Goals/Objectives Core Competency Overall Summary Career Development Job Description Employee Comments

Section 2 - Employee Goals

Expand Collapse






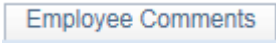
Goal 1: Increase customer satisfaction by 10%

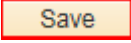

Description : Increase customer satisfaction by 10% by year end.

Due Date :
Status: In Progress
Percent Complete: 0

Manager Rating 4- Exceeds Expectations 4.00

Manager Comments

| Step | Action |
|------|---|
| 8. | Click the scrollbar . |
| 9. | Continue reviewing Goals . Click the scrollbar . |
| 10. | The manager has entered comments in the Goals Summary section. Click the scrollbar . |
| 11. | Click the Core Competency tab.  |
| 12. | Click the Expand link.  |
| 13. | Continue with reviewing the Competency Manager Ratings and Comments . Click the scrollbar . |
| 14. | Click the scrollbar . |
| 15. | Click the scrollbar . |
| 16. | Click the Overall Summary tab.  |
| 17. | The Overall Summary page provides an average of all the ratings entered. The Manager may have added Comments within this section as well. |
| 18. | Click the Career Development tab.  |
| 19. | Click the scrollbar . |
| 20. | Click the scrollbar. |
| 21. | Click the Job Description tab.  |
| 22. | You may enter your comments regarding the employee final evaluation. Click the Employee Comments link.  |
| 23. | Enter the desired information into the field. Enter " Thank you for the positive employee performance evaluation. ". |

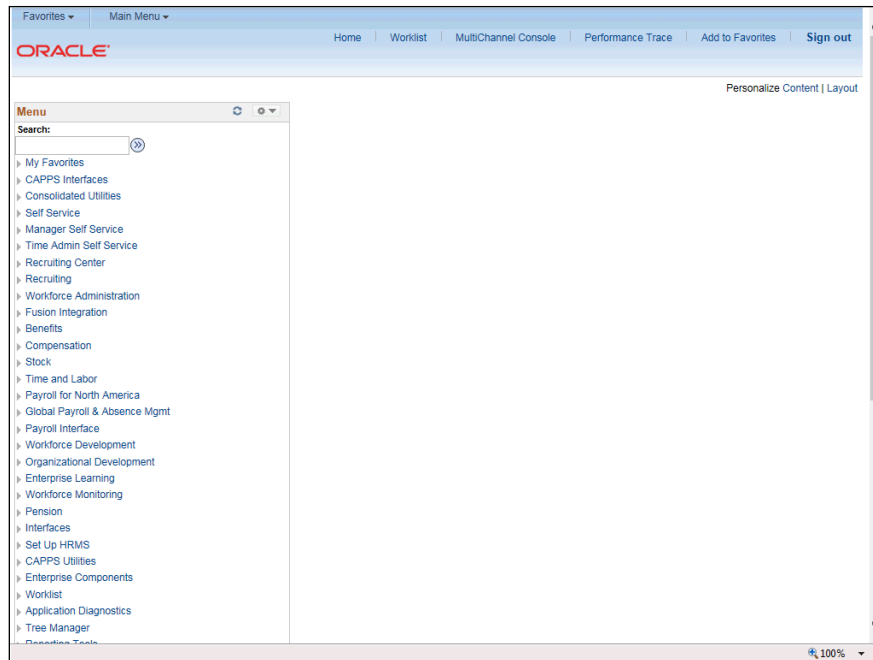
| Step | Action |
|------|--|
| 24. | Click the Save button.  |
| 25. | Click the Home link.  |
| 26. | Congratulations! You have completed this lesson. End of Procedure. |



Acknowledging Evaluation





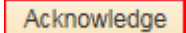
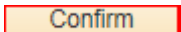

Section 2, Lesson 6 Exercise - Scenario: Acknowledging Evaluation

Procedure

In this lesson you will learn how to Acknowledge a performance evaluation upon request from your manager.



| Step | Action |
|------|--|
| 1. | Click the Self Service link.  |
| 2. | Click the Performance Management link.  |

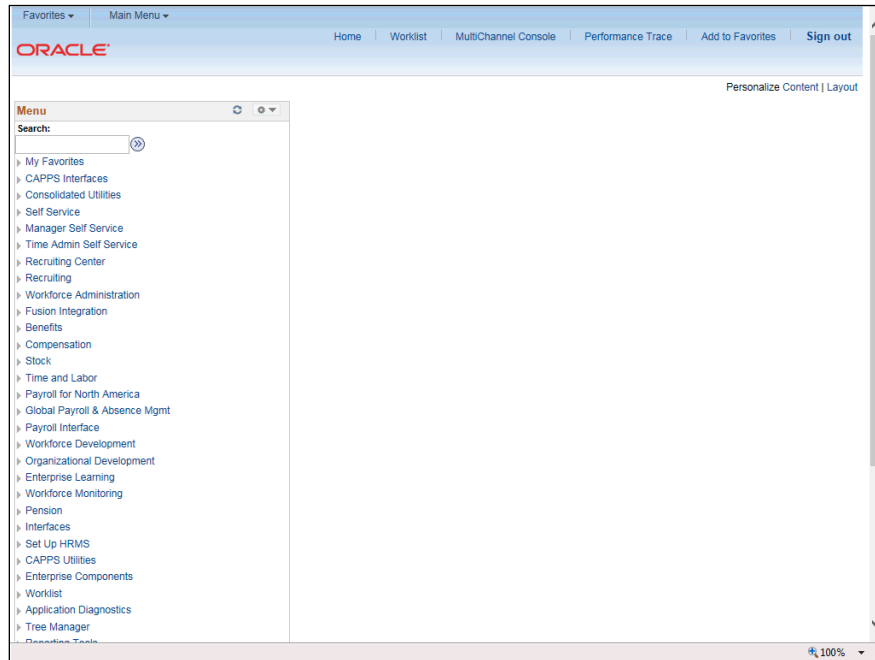
| Step | Action |
|------|--|
| 3. | Click the My Performance Documents link.  |
| 4. | Click the Current Documents link.  |
| 5. | Click the Statewide Long Document Type link.  |
| 6. | Notice where you are in the process. Highlighted in yellow is what needs to occur - Employee Acknowledgement. |
| 7. | Click the Minimize Performance Process button.  |
| 8. | Click the Acknowledge button.  |
| 9. | Click the Confirm button.  |
| 10. | The manager will receive an automated email indicating that the document has been acknowledged by you. In the case you are absent or refuse to acknowledge, the manager can override the acknowledgement and complete the evaluation process. |
| 11. | Click the Home link.  |
| 12. | Congratulations! You have completed this lesson. End of Procedure. |


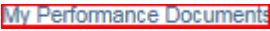

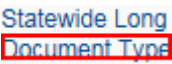


Viewing/Printing Historical Documents

Section 2, Lesson 7 Exercise - Scenario: Viewing/Printing Historical Documents

Procedure

In this lesson you will learn how to view, print, save your completed employee performance evaluation.



| Step | Action |
|------|---|
| 1. | Click the Self Service link.  |
| 2. | Click the My Performance Documents link.  |
| 3. | Once an evaluation is completed, it will be located under Historical Documents. Click the Historical Documents link.  |
| 4. | Click the Statewide Long Document Type link.  |
| 5. | Click the Minimize Performance Process button.  |
| 6. | Click the Print link.  |

Statewide Long Document Type
Manager Evaluation - Completed

Test Employee DEFG

Job Title: Administrative Asst II **Manager:** New Manager
Document Type: Statewide Long Document Type **Period:** 01/01/2018 - 12/31/2018
Template: Statewide Long Eval Form **Document ID:** 189016
Status: Completed **Due Date:**

| Employee Data | |
|-----------------------------|----------------------|
| Department : 2000 | Operations Admin |
| Location Code : 5000 | 5000 - 100 N Main St |






The document status is Completed.



Section 1 - Document Purpose
Annual Employee Evaluation

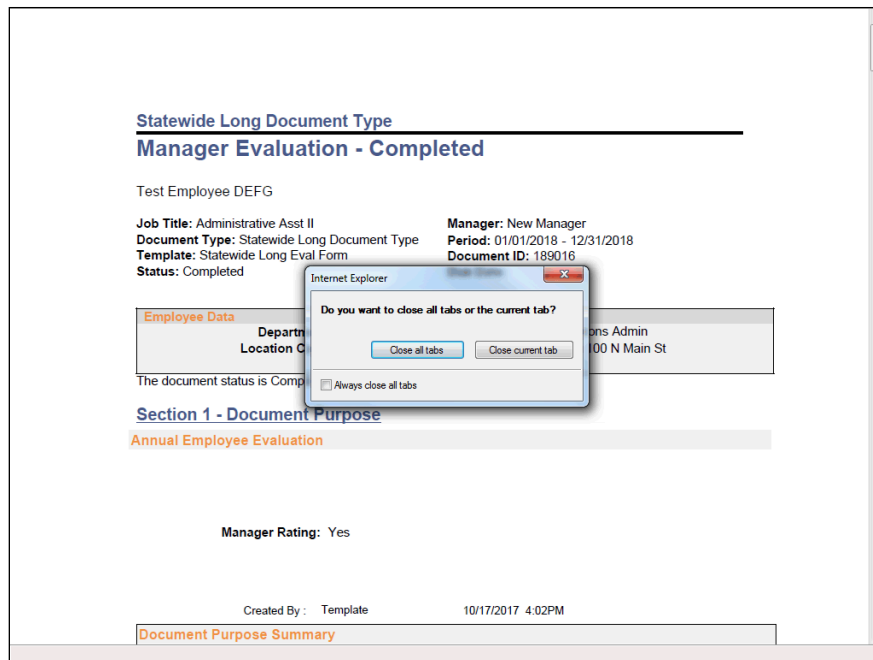
Manager Rating: Yes

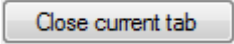
Created By [icon] [icon] [icon] [icon] [icon] 1 01/17/2017 [icon] [icon]

Document Purpose Summary

| Step | Action |
|------|--|
| 7. | Using this tool bar, you can either Save , Print , and/or View . Click the Next Page object.  |
| 8. | Click the Next Page object.  |
| 9. | Click the Next Page object.  |
| 10. | Click the Next Page object.  |
| 11. | Click the Next Page object.  |
| 12. | The eSignature section displays your signature once you acknowledge the evaluation. |
| 13. | When a manager overrides the acknowledgement, their name appears in the Employee Signature section with (Manager Override) indicated. |

| Step | Action |
|------|---|
| 14. | Click the scrollbar .  |
| 15. | Click the scrollbar . |
| 16. | Click the Close button.  |



| Step | Action |
|------|---|
| 17. | Click the Close current tab button.  |

CAPPS HR/PAYROLL

EUT Course



Oracle CAPPS HR/PAYROLL Interface - Manager Evaluation - Completed

Statewide Long Document Type

Manager Evaluation - Completed

Test Employee DEFG

Job Title: Administrative Asst II
 Document Type: Statewide Long Document Type
 Template: Statewide Long Eval Form
 Status: Completed

Manager: New Manager
 Period: 01/01/2018 - 12/31/2018
 Document ID: 189016
 Due Date: 03/01/2019

Employee Data

Department: 2000
 Location: 5000

Operations Admin
 5000 - 100 N Main St

The document status is Completed.

Long Format

Type of Evaluation | Goals/Objectives | Core Competency | Overall Summary | Career Development | Job Description | Employee Comments

Section 1 - Document Purpose

Expand | Collapse

Annual Employee Evaluation

Document Purpose Summary

Manager Comments

| Step | Action |
|------|--|
| 18. | Click the Home link. Home |
| 19. | Congratulations! You have completed this lesson. End of Procedure. |